

## Outline Current Clinical Flow

Use the following boxes to record each step of your current clinical flow and to identify how your clinical setting incorporates prevention activities. Specify with whom the patient meets and interacts and briefly describe the nature of the interaction. Identify when forms are completed and when services are documented.

### Current Clinical Flow

#### *Patient Enters the Clinic for an Appointment*

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**Answer the following questions to help you complete the box above.**

- How and when does your clinical setting identify which screening activities are up-to-date and which preventive services are indicated for your patients?
- Whom does the patient see before seeing the clinician?
- What is done/discussed during this interaction?
- What educational materials are available for the patient to read in the waiting area?
- Do staff provide appropriate materials?

#### *Patient Sees the Clinician*

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**Answer the following questions to help you complete the box above.**

- How does the clinician know which preventive services to offer/order?
- How is the patient's preventive care monitored over time?
- What preventive services are documented?
- How and where are these services documented?

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***Patient Exits the Clinic***

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**Answer the following questions to help you complete the box above.**

- What kind of monitoring system is in place to follow up with off-site screenings?
- What kind of reminder system is in place to follow up with screenings and counseling that are needed but that were not done at this visit?

Chapter 3 explains how to use the valuable information you just gathered to design and implement a system for delivering preventive services that fits your needs.